r on and Target Audiences.

Gloucester's population

Gloucester has a population of **128,500** residents. The city centre has more young people living there making it feel like a young and vibrant city. The demographic information available for the city shows that that C1 is the largest social grade with 31.75 % of people in your target area. The second largest grade is DE with 26.84 %, whilst the least represented grade is AB with 18.18 %.

The dominant Mosaic Group is H Aspiring Homemakers with a count of 8,318, which is 16.57 % of the area. They are younger households settling down in housing priced within their means. Their key features are:

- Younger households
- Full-time employment
- Private suburbs
- Affordable housing costs
- Starter salaries
- Ranked the 5th highest for income out of 15 groups
- Ranked the youngest out of 15 groups

Online and Website

In March 2021, the new website was launched with the following new functionality, enhanced things to do listings, inspiration tiles, and improved mobile optimisation. Throughout the year, the team have been reviewing the website and making tweaks to optimise it using keyword research. **In 2021 the website achieved 220,000 website users: a 51% increase on 2020 and 5% increase on 2019.** In 2020, the Visit Gloucester website received 145,452 users. This was a decrease of 30.19% on the 2019 web user figures (208,362 in 2019). The website is accessed mostly on mobile (73%), which is why making the website mobile first was so important.

In 2021, we created 108 blog articles and promoted 256 events, compared to 44 events last year and provided business information for 172 businesses in the city.

Our most popular web pages in 2021 were:

- Things to do
- Shopping
- What's On
- Robinswood Hill Country Park
- Gloucester Quays

The top 5 countries our web users were from in 2021 were:

- UK (95%)
- USA (4%)
- Ireland (0.4%)
- Australia (0.3%)
- Israel (0.2%)

The Top Cities for our website users were:

- London

- Gloucester
- Edinburgh

Examining Facebook Insights, we can see that the top age ranges of our Facebook followers are 25-34 (28%) and 35-44-year-olds (26%). The gender divide is 65% female fans and 35% male fans. For 2021, our page reach was 821,902 users- a 354% increase on 2020 with total post engagements of 208,066 (^62.1%).

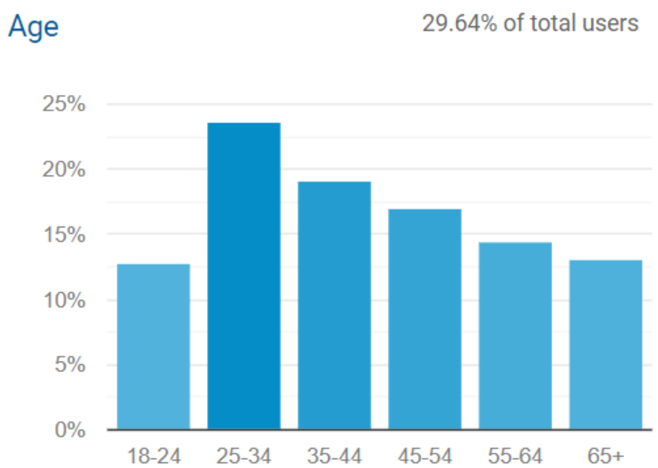
The top countries our Facebook followers are from in 2021:

- UK
- US
- Australia

Top cities:

- Gloucester
- Cheltenham
- Bristol

The image below shows the ages of the people who use the website:



It is reassuring to see younger Gen Z/Millennials demographics performing well for using the website. We were also able to grow our 18–24-year-old audiences this year by 3% to 13% in 2021 from 10% in 2020. This suggests we are creating content that appeals to them.

Target Audiences

The continuing uncertainty around the COVID19 pandemic has led us to target mainly domestic audiences in 2022:

Gen Z (under 24)

The younger Gen Zs are the highest spenders when they travel. Calling themselves 'flashpackers', they can spend around about £2,000 per trip and £60 a day. They are more likely to look and book online, with 43% of Generation Z using OTAs to plan trips, and they take an average of 29 days leave for travel per year. Inspired by Gen Zers such as Greta

Thunberg, Gen Zers are growing up with acute awareness of, and sense of responsibility towards the global community and environment. The intense use of technology, as well as nervousness around issues such as climate change, the global economy and more recently, Covid-19, is making Generation Z more nervous and increasingly aware of the importance of physical and mental health, than their predecessors. In countries such as Germany and the UK, their attitudes around aviation tax and the future of mobility appear to differ sharply from their older counterparts. They are looking for authentic experiences which do minimal damage to the planet.

Intergenerational Family Travel

Covid kept us apart, but as its shadow shortens, we are taking stock and putting things right. Next year, travellers will return to the embrace of their families – and not within the confines of their homes but striking out for new shores and new sights. This is about making time for quality time. Ultimately, this is an antidote to the past eighteen months. While some families experienced the boredom and strain of the same four walls, other extended families did not see each other at all. The Big Family Get-Together is about righting this - and with our best foot forward. They are seeking fresh air and the great outdoors. They want something for all generations too. We can position ourselves as the perfect intergenerational break; there are plenty of activities for kids, as well as our situation where older generations can enjoy the scenery of the Cotswolds.

Domestic Solo Traveller

The demand for solo travel has boomed. Cooped up and worn out, Covid made many of us reassess our goals and our wants. Here, on the other side, many travellers are seeking to commune with the world on their terms – going solo, going alone. Solo travellers are looking for the sense of freedom and independence, not having to consult with people on where to stay, what to eat, and what to do. These travellers are looking to escape the grind, mixing things up, setting challenges, and pushing their comfort zones. They are less likely to want to do the mainstream things and are looking for unique added value experiences that are life-enriching.

Domestic Travel Trade

Organised Domestic Group Travel is likely to come online in larger numbers before international groups do. These operators are a key market for heritage attractions and tours, and also for bringing people into the city for festivals such as Tall Ships Festival. As 2022 is a Tall Ships year, it is imperative we work closely with these groups to draw in the biggest audience for this festival as possible. This market has been severely hit by Covid due to the age of audience and lack of social distancing available on coaches. We will need to reconnect with Group Travel Operators early in the year at Britain and Ireland Marketplace.

Developmental Audiences

Marketing to bring online new audiences, especially inbound visitors, can take up to two years before you can expect them to visit. However, once they do return it is likely the companies will bring visitors year on year. We can see from the data above that inbound audiences, although few for Gloucester, do spend a lot when here which is vital to the economy (the average spend for an inbound visitor is £601 vs domestic visitor of £202). It involves a lot of promotion through travel trade events and through working closely with Visit Britain. We will employ a mixture of B2B and B2C marketing to target visitors to the UK.

The Nordic Market

The Nordic market provides a great opportunity to grow our inbound market when inbound travel comes back online. Although the numbers visiting seem modest at 647,461, the spend that they generate is high (£674 per stay) as their average length of stay is high at 4.7 nights. 46% of all visitor spending comes courtesy of visiting for a holiday, and the Nordic market are known for their repeat visitation of England meaning if you can win them over once, it is likely they will visit time and time again. They also feel welcome in England with 99% of departing visitors say they were made to feel either 'welcome' or 'very welcome' in Britain (https://www.visitbritain.org/markets/norway)

The Nordic market is known for their love of shopping, often visiting London to undertake clothes shopping, and maximising on the strength of their currency compared to the relatively low value of the pound. Engaging with this market through Travel Trade Events to position Gloucester as the ideal city break shopping destination for young people in Sweden, Denmark and Norway will be undertaken towards the end of 2022.

They are also the market which is most likely to come back online soonest after the COVID19 pandemic, having had a relaxed attitude toward lockdowns and social distancing.

North American independent travellers

The US market remains an attractive market for growth, with many Americans using the low pound as an opportunity to make that once in a lifetime trip to the UK. America is the second biggest market for inbound visits (450m) to the UK and the first in terms of spend (£4.8bn). In 2019, the average US visitor spend was £930 on leisure in the UK. They are also a market which is more likely to travel offseason, with 69% of their travel taking place between October and June.

Americans have a positive perception of Britain as they ranked Britain 3rd overall among 50 nations to visit. They rate Britain highly for sport, contemporary culture, and vibrant city life, all things that Gloucester has a strong offering in. We already have a good starting point for a strong relationship with the US as we were a key member of the Visit Britain Discover England Fund (DEF) US Connections project, which looks to develop the relationship between certain locations and the US. An outcome of the project was the creation of a new, bookable guided tour experience highlighting Gloucester's links with the American national anthem and the origins of faith and religion in the US. The tour begins with an organ performance of the Star-Spangled Banner and tour of Gloucester Cathedral (the composer John Stafford Smith was born at the cathedral and was the son of the organist), followed by a tour of the city and St Mary de Crypt Church, telling the stories of Gloucester-born religious pioneers George Whitefield (a Methodist and Evangelical minister who preached in the early American colonies) and Robert Raikes (one of the founders of the Sunday School Movement). The Connections project was extended by six months in September 2020 and will look to maintain dialogue with the US group travel market and develop new product ready for when confidence returns to the inbound market. Visit Britain has highlighted America as a key market for growth in the next five years which will help to amplify any marketing to this audience we undertake.

Canada

The UK was the 3rd most visited European destination by Canadians in 2019, although the numbers are modest at 874,061 visitors to the UK in 2019. Top activities featuring visits from Canada to the UK include dining in restaurants, shopping, and going to a pub. Culture and history are strong pulls to the UK. Canadians have a higher-than-average propensity to visit museums and art galleries, and over 4 in 10 visit historic houses and castles so Gloucester's rich history and heritage will appeal to this audience. Canadians are positive about Great

Britain: the nation is ranked 2nd among 50 nations. Like the US market, Gloucester has an advantageous position in marketing to Canada through the US Connections project. Ancestry and family history are big draws for the Canadian market and Gloucester is fortunate enough to have a fantastic archive and local history centre that can help this audience discover more about their links to Gloucester. Like the Nordic market, they are repeat visitors to England, delivering a good ROI (return on investment) on marketing spend.